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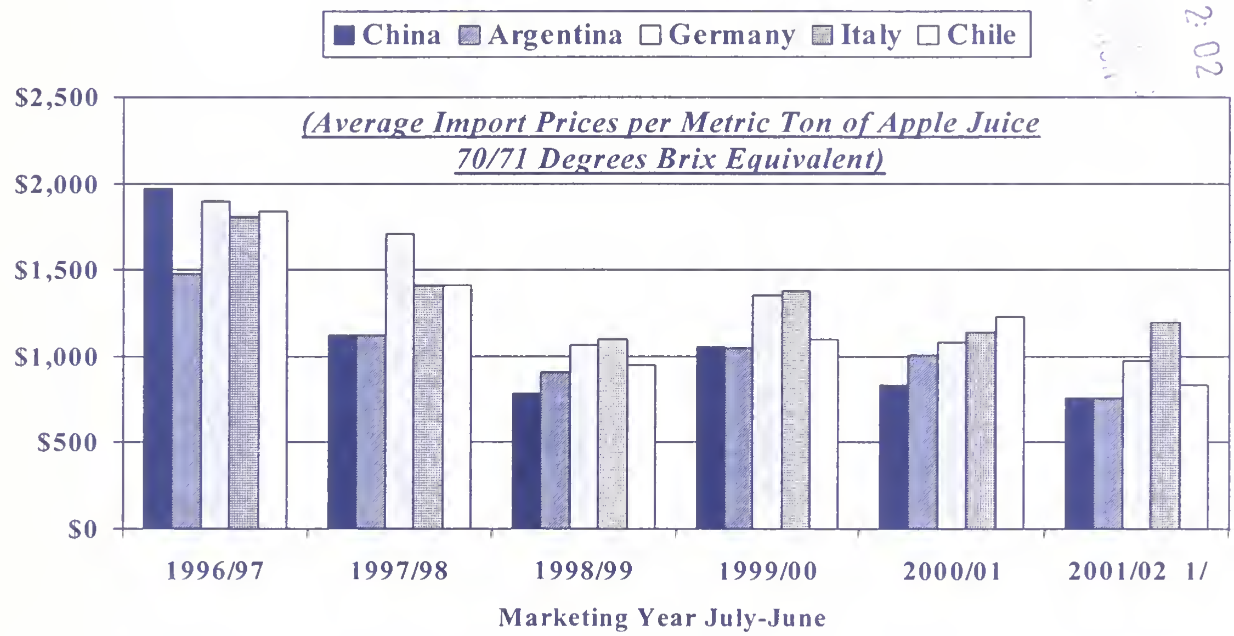
World Horticultural Trade and U.S. Export Opportunities

Apple Juice from China Remains the Lowest-Priced Option for U.S. Importers



1/ Average import price for the period July 2001 to February 2002.
Source: U.S. Department of Commerce, Bureau of the Census

Fierce competition between leading world suppliers of apple juice (AJ) has put downward pressure on the average price of U.S. AJ imports. The decreasing trend in AJ prices began about 5 years ago, when world supplies increased and demand remained flat. AJ from Argentina was the first to react to the changing market conditions. However, not long after, China strongly stepped up exports of low-priced AJ to the United States and to other major import markets, such as the European Union (EU). Germany, in the EU, and the United States are the world's largest importers of AJ. Both countries import large quantities of the low-acid juice to blend with other levels of acid juice for use in the food and beverage industries. China, a major world supplier of low-acid AJ juice, has boosted its AJ shipments to the world with a lower-priced product. In the United States, China has become a significant supplier of AJ, concentrate non-frozen. Large supplies of the low-priced Chinese product put significant downward pressure on the average price of U.S.-made AJ concentrate and on the average price U.S. growers received for juice apples. Today, AJ imports from certain sources in China face antidumping duties in the United States. However, the punitive duties have not diminished the volume of product entering the United States from China.

[Check Out the New U.S. Trade Internet System Website. Go to http://www.fas.usda.gov/ustrade]

For further information, contact:
U.S. Department of Agriculture - Foreign Agricultural Service
Horticultural and Tropical Products Division
1400 Independence Ave., S.W. Stop 1049
Washington, DC 20250-1049
Telephone: 202-720-6590
Fax: 202-720-3799
http://www.fas.usda.gov/htp

Frank Tarrant, Director
Scott Bleggi, Deputy Director for Marketing
Brian Grunenfelder, Deputy Director for Analysis

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Export Summary

U.S. exports of horticultural products to all countries in February totaled $849 million, an increase of 5 percent from the same month a year earlier. The categories with increases in February were tree nuts (up 26 percent to $91 million), essential oils (up 25 percent to $63 million), miscellaneous horticultural products (up 5 percent to $173 million), and fresh vegetables (up 6 percent to $100 million). The categories with the most significant decreases were fruit and vegetable juices (down 6 percent to $47 million), and processed vegetables (down 4 percent to $122 million).

February 2002 exports to Canada were up 11 percent from February 2001 to $271 million, while exports to the European Union rose 10 percent to $156 million, sales to Japan fell 9 percent to $121 million, and sales to Mexico fell 10 percent to $69 million. Exports to several Asian countries showed significant growth in February 2002 compared with the previous year. Exports to Korea rose 45 percent from February 2001 to $37 million, exports to China rose 42 percent to $13 million, and exports to Malaysia rose 30 percent to $9.9 million. However exports to Hong Kong fell 3 percent to $25 million, while exports to Taiwan fell 25 percent to $15 million.

Exports for the Fiscal Year (FY) 2002 period were down less than 1 percent from the same period in FY 2001 to $4.6 billion. Tree nut exports were up about 7 percent to $643 million for the October-February 2001 period, while essential oils exports were up 11 percent to $277 million, and processed vegetables rose less than 1 percent to $670 million. All other categories declined. Exports to Canada rose 3 percent to $1.3 billion for the October-February period, while exports to the European Union and Japan fell 2 percent and 9 percent respectively, compared with the same period in FY 2001. The fastest growing markets for FY 2002 to date are: India, up 44 percent; Korea, up 28 percent; China, up 16 percent, Malaysia, up 9 percent; and Mexico, up 7 percent. Export to most other major markets declined during the October 2001-February 2002 period from the same period in FY 2001.

To access FAS Attaché Reports online, please reference the following Internet address:

http://www.fas.usda.gov/scriptsw/attacherep/default.asp

Search through the country and market reports prepared by FAS attaches covering over 20 horticultural and tropical product commodities and nearly 130 countries. Search by keyword, including country and commodity.

What's New on the Homepage?

The Horticultural & Tropical Products Division has introduced an enhanced feature on its homepage designed to bring the latest information to the public as efficiently as possible. The site will contain information on policy and technical developments affecting trade in horticultural commodities, as well as selected reports submitted by FAS overseas offices and special reports prepared by the division. The information will typically remain on the site for approximately one month, before being archived. For further information on this new feature, please contact Nancy Hirschhorn (202) 720-2974. Go to http://www.fas.usda.gov/htp/ and click on "What's New?"

Apple Juice Production and Trade in Selected Countries

Production of apple juice (AJ) in selected countries in 2001/02 is estimated at nearly 880,000 metric tons (70/71 degrees brix equivalent), 10 percent below the previous season's output. The downturn reflects decreased production in the main Northern Hemisphere producing countries, including Germany, Italy, Hungary, and the United States. Production of AJ in Argentina and Chile, the major producing countries in the Southern Hemisphere, is also forecast to decrease in the 2001/02 season. AJ production in China, the world largest producer, in 2001/02 is forecast to increase 16 percent to 200,000 tons. Exports of AJ from selected countries in 2001/02 are estimated at 754,000 tons, 2 percent below last season's shipments. U.S. AJ exports are expected to continue to decline in 2001/02, mainly due to lower production and increased domestic demand. These factors, on the other hand, are expected to boost U.S. AJ imports in 2001/02 to a record 285,000 tons, 26 percent more than imports in 2000/01. U.S. imports of AJ have increased steadily since the 1998/99 season, driven by decreased production, increased world supplies of lower-priced product, and increased demand as an ingredient in the juice, soft drink, and snacks processing industries.

China, the world's largest producer of AJ, continues to expand exports in 2001/02

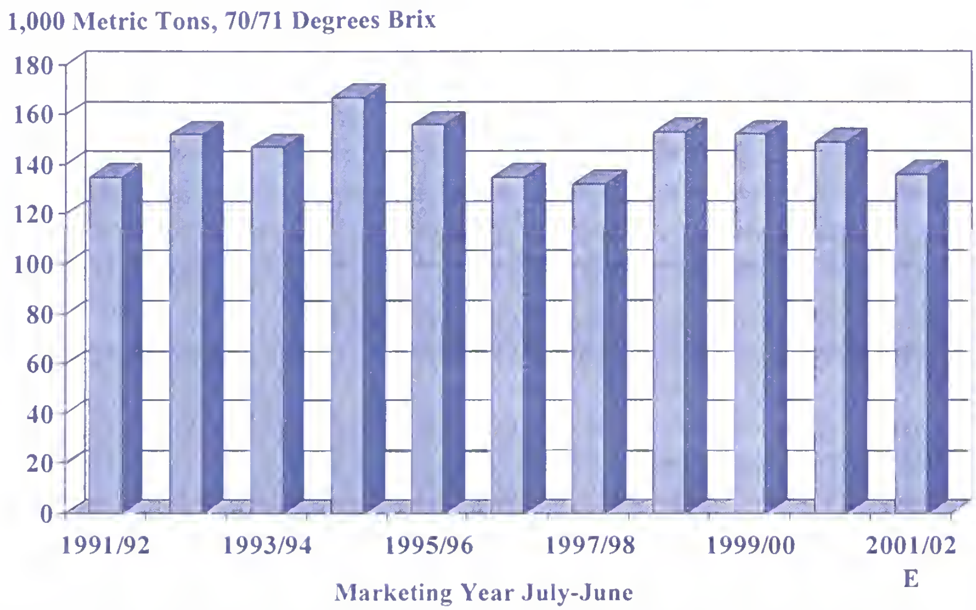
In marketing year (MY) 2001/02, China will likely surpass Poland and become the world's largest AJ producer. China's AJ production in 2001/02 is estimated at 200,000 tons (70/71 degrees brix), up 16 percent from the 2000/01 output, and slightly over Poland's estimated 190,000-ton output. In recent years, AJ production in China has been driven by increased export demand. Moreover, China can supply AJ at relatively lower prices than its competitors. Concentrated not-frozen AJ continues to be the main processed apple product in China.

Shandong province is China's major AJ-producing region. AJ production in Shandong province last season was estimated at 66,000 tons, nearly 40 percent of China's 2000/01 total AJ output. Much of the production of AJ in Shandong originates from 6 or 7 companies or processing plants. In the past, there were many processing plants in Shandong province. However, the number of AJ factories is believed to be decreasing, due to continued low world prices. Reportedly, less than 20 factories are now in operation within Shandong province, but only 6 or 7 are capable of large-scale production.

Some in the AJ industry are very concerned about the low quality of China's AJ. Moreover, some believe that the quality of the product will not improve until processors switch to higher quality fruit. Apple growers generally sell their poorer quality fruit to AJ processors at low prices. Higher quality fruit is sold at much higher prices to the fresh consumption market.

Most of China's AJ is exported. China's exports of AJ in 2001/02 are forecast at more than 177,000 tons, up 15 percent from shipments in 2000/01. The main export destinations are expected to remain the United States and some countries in the EU. China exports low acid AJ, which is blended with high acid juice by the food and beverage industries in many importing countries.

U.S. Apple Juice Production Continues to Show Its Decreasing Trend



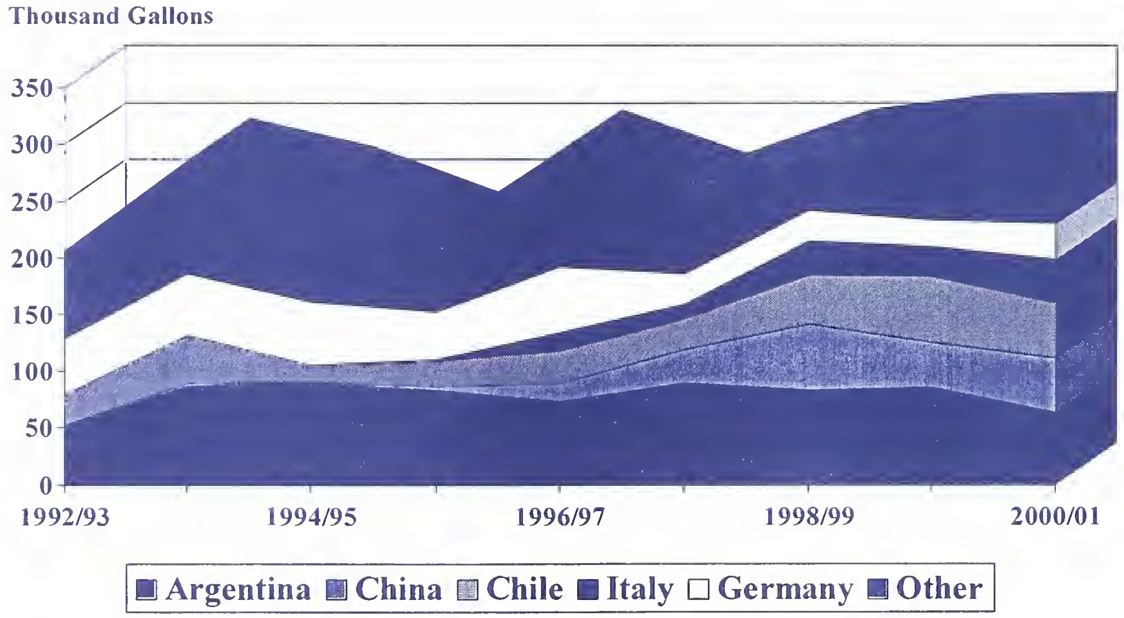
Source: U.S. Foreign Agricultural Service using data from the National Agricultural Statistics Service.
E-Estimate

The United States will remain a strong consumer of imported AJ

U.S. AJ production is expected to continue its downturn trend. Output in 2001/02 in the United Sates is estimated to decrease for the third consecutive season to 135,500 tons, down 9 percent from 2000/01 and the lowest level since 1997/98. Reduced supplies of processing apples and less attractive prices for processing fruit are expected to hamper overall U.S. AJ production in 2001/02. The amount of processing apples in 2001/02 in the United States is expected to decline 9 percent to 998,000 tons.U.S. import demand for AJ is expected to continue its upward trend, as well as remaining a net importer. U.S. AJ imports in 2001/02 are estimated at a record 285,000 tons, up 26 percent from 2000/01. U.S. import demand for mostly concentrated non-frozen AJ, totaled more than 176,000 tons, 70/71 degrees brix equivalent, for the period July 2001 through February 2002, up 30 percent from the same period last season.

The increase reflects increased imports from Argentina, Chile, and China. A rebound in import demand for the Chinese product has revived the U.S. industry's concern about China's AJ marketing strategy in the United States. Argentina, Chile, and China, are the major suppliers of AJ to the U.S. market. The Chinese product, however, is, on average, entering the United States at the lowest price. In response to industry complaints about the surge of low-priced AJ from China, on May 15, 2000, the United States imposed antidumping duties on certain suppliers of Chinese non-frozen AJ concentrate. The duties assessed range from 9 percent to 52 percent. However, these punitive duties have not reduced the volume of AJ entering the United States from China. The dumping duties will be in effect at least until 2005.

U.S. Imports of Apple Juice Continue to Increase



Source: U.S. Department of Commerce, Bureau of the Census

(The FAS Attaché Report search engine contains reports on the apple juice industry for more than 10 countries. For further information on supply, distribution, and trade, contact Samuel Rosa at (202) 720-6086).

APPLE JUICE: PRODUCTION, SUPPLY, AND UTILIZATION IN SELECTED COUNTRIES (METRIC TONS AT 70/71 DEGREES BRIX EQUIVALENT)

Country/ 1/ Mkting Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
NORTHERN HEMISPHERE COUNTRIES							
China							
1999/00	0	103,000	681	103,681	70,710	32,971	0
2000/01	0	173,000	481	173,481	153,415	20,066	0
2001/02 E	0	200,000	594	200,594	177,147	23,447	0
Germany							
1999/00	107,631	98,560	266,658	472,849	76,048	269,709	127,092
2000/01	127,092	122,199	312,567	561,858	86,484	305,388	169,986
2001/02 E	169,986	75,000	300,000	544,986	90,000	274,986	180,000
Hungary							
1999/00	0	44,000	3,000	47,000	33,000	14,000	0
2000/01	0	82,000	15,000	97,000	72,000	25,000	0
2001/02 E	0	47,500	11,500	59,000	39,000	20,000	0
Italy							
1999/00	0	65,000	39,000	104,000	100,000	4,000	0
2000/01	0	71,000	35,000	106,000	102,000	4,000	0
2001/02 E	0	65,000	35,000	100,000	96,000	4,000	0
Poland							
1999/00	5,000	80,000	21,000	106,000	89,000	10,000	7,000
2000/01	7,000	190,000	3,000	200,000	185,000	11,000	4,000
2001/02 E	4,000	190,000	3,000	197,000	185,000	11,000	1,000
Spain							
1999/00	1,200	21,000	16,500	38,700	25,500	10,500	2,700
2000/01	2,700	18,000	12,300	33,000	17,500	13,500	2,000
2001/02 E	2,000	21,400	10,000	33,400	17,500	14,000	1,900
United States 2/							
1999/00	0	152,397	224,678	377,075	6,838	370,237	0
2000/01	0	149,008	225,934	374,942	5,391	369,551	0
2001/02 E	0	135,500	285,000	420,500	5,000	415,500	0
SUBTOTAL NORTHERN HEMISPHERE COUNTRIES							
1999/00	113,831	563,957	571,517	1,249,305	401,096	711,417	136,792
2000/01	136,792	805,207	604,282	1,546,281	621,790	748,505	175,986
2001/02 E	175,986	734,400	645,094	1,555,480	609,647	762,933	182,900

APPLE JUICE: PRODUCTION, SUPPLY, AND UTILIZATION IN SELECTED COUNTRIES (METRIC TONS AT 70/71 DEGREES BRIX EQUIVALENT)

Country/ 1/ Mkting Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1999/00	3,154	42,328	4,638	50,120	37,574	8,500	4,046
2000/01	4,046	83,543	1,585	89,174	69,449	8,000	11,725
2001/02 E	11,725	63,000	500	75,225	70,000	5,000	225
Chile							
1999/00	248	35,800	0	36,048	35,307	500	241
2000/01	241	46,100	0	46,341	45,500	500	341
2001/02 E	341	40,000	0	40,341	39,400	500	441
New Zealand							
1999/00	0	19,947	400	20,347	11,537	8,810	0
2000/01	0	16,000	400	16,400	9,300	7,100	0
2001/02 E	0	15,600	400	16,000	11,500	4,500	0
South Africa							
1999/00	0	27,390	5,575	32,965	25,835	7,130	0
2000/01	0	23,960	5,900	29,860	22,000	7,860	0
2001/02 E	0	26,250	6,000	32,250	23,000	9,250	0
SUBTOTAL SOUTHERN HEMISPHERE COUNTRIES							
1999/00	3,402	125,465	10,613	139,480	110,253	24,940	4,287
2000/01	4,287	169,603	7,885	181,775	146,249	23,460	12,066
2001/02 E	12,066	144,850	6,900	163,816	143,900	19,250	666
TOTAL SELECTED COUNTRIES							
1999/00	117,233	689,422	582,130	1,388,785	511,349	736,357	141,079
2000/01	141,079	974,810	612,167	1,728,056	768,039	771,965	188,052
2001/02 E	188,052	879,250	651,994	1,719,296	753,547	782,183	183,566

1/ Northern Hemisphere marketing years are July-June for all countries except Italy where the marketing year is January-December. Southern Hemisphere marketing year is January-December except New Zealand where the marketing year is October-September.

2/ U.S. stock figures not available. U.S. apple juice production is estimated using the proportion of the fresh apple crop that is processed into juice and cider. U.S. export and import data is from U.S. Dept. of Commerce.

Note: Data for Mexico, Austria, Bulgaria,, France, and Australia has been discountinued, as FAS no longer requires reporting on apple juice for those countries.

E= Estimate

Source: U.S. Department. of Commerce, Bureau of Census; USDA Attache reports and USDA/FAS estimates.

U.S. Apple Juice Imports
Marketing Years 1996/97-2000/01 and year to date
(July-June)
Metric Tons, 70/71 Degrees Brix Equivalent

Country	Rank by Volume 1/	1996/97	1997/98	1998/99	1999/00	2000/01	Percent Change 2/	Jul-Feb 2000/01	Jul-Feb 2001/02	Percent Changed 3/
Argentina	1	53,616	65,303	60,646	62,768	46,019	-27%	23,722	53,993	128%
China	2	11,317	21,914	43,403	29,126	35,542	22%	19,860	30,136	52%
Chile	3	21,370	19,971	31,583	42,268	35,020	-17%	21,077	31,183	48%
Italy	4	11,831	9,036	21,377	18,668	28,081	50%	17,771	7,582	-57%
Germany	5	42,715	19,908	20,291	17,359	23,437	35%	15,177	16,661	10%
Hungary	6	27,071	19,179	6,273	2,092	11,014	426%	8,204	5,770	-30%
New Zealand	7	2,923	6,305	1,340	2,407	9,430	292%	5,519	3,281	-41%
Turkey	8	8,842	1,001	4,827	7,968	9,061	14%	5,451	5,141	-6%
South Africa	9	6,329	7,513	9,972	15,661	6,079	-61%	4,593	6,568	43%
Brazil	10	4,798	3,796	3,738	8,847	4,957	-44%	3,987	4,207	6%
Mexico	11	3,752	4,871	3,477	8,136	4,326	-47%	2,953	3,574	21%
Austria	12	8,227	1,245	1,739	1,372	4,072	197%	1,833	1,982	8%
Canada	13	2,662	3,518	2,713	3,856	3,552	-8%	2,234	2,584	16%
Poland	14	1,108	64	499	655	2,031	210%	1,191	1,699	43%
Moldova	15	2,467	1,041	1,237	579	1,148	98%	1,148	738	-36%
Others		5,267	1,543	1,215	2,916	2,165	-26%	1,194	1,021	-14%
Total		214,293	186,207	214,329	224,678	225,934	1%	135,915	176,122	30%

1/ Rank by descending order of volume of supplied product in marketing year 2000/01.

2/ Percentage changed from Marketing Year 1999/01/00 to 2000/01.

3/ Percentage changed from Jul-Feb 2000/01 period to Jul-Feb 2001/02.

U.S. Apple Juice Imports
Marketing Years 1996/97-2000/01 and year to date
(July-June)
Value in U.S. Dollars

Country	Rank by Value 1/	1996/97	1997/98	1998/99	1999/00	2000/01	Percent Changed 2/	Jul-Feb 2000/01	Jul-Feb 2001/02	Percent Changed 3/
Argentina	1	$78,966,061	$73,281,802	$55,255,473	$65,777,527	$46,189,169	-30%	$28,912,179	$40,755,898	41%
Chile	2	$39,270,307	$28,267,477	$30,050,798	$46,407,134	$43,048,237	-7%	$30,013,333	$26,073,625	-13%
Italy	3	$21,405,103	$12,782,700	$23,454,848	$25,641,953	$32,046,506	25%	$21,700,161	$9,074,120	-58%
China	4	$22,299,718	$24,656,275	$34,064,871	$30,662,961	$29,730,207	-3%	$17,108,298	$22,790,224	33%
Germany	5	$81,067,575	$34,015,682	$21,561,493	$23,467,241	$25,308,693	8%	$16,906,081	$16,284,006	-4%
Hungary	6	$43,886,982	$20,373,536	$5,085,423	$2,610,014	$10,545,904	304%	$7,797,813	$6,988,285	-10%
Turkey	7	$16.244,093	$1,404,260	$4,014,923	$8,645,106	$9,588,197	11%	$5,623,997	$4,250,874	-24%
New Zealand	8	$4,976,532	$7,376,193	$1,247,578	$2,375,018	$8,740,249	268%	$5,574,025	$2,657,785	-52%
South Africa	9	$12,532,415	$10,103,451	$8,324,554	$18,669,068	$7,662,674	-59%	$6,261,153	$5,982,957	-4%
Canada	10	$6,809,352	$7,930,522	$6,212,027	$8,083,142	$7,597,701	-6%	$4,587,289	$5,680,697	24%
Mexico	11	$8,352,055	$7,757,363	$4,280,497	$10,684,974	$6,130,381	-43%	$3,786,810	$6,194,442	64%
Brazil	12	$8,558,531	$4,151,609	$2,660,136	$10,168,983	$5,424,846	-47%	$3,833,120	$4,859,175	27%
Austria	13	$15,241,452	$2,140,740	$2,020,751	$2,007,317	$4,809,758	140%	$2,275,994	$2,606,908	15%
Poland	14	$2,082,582	$352,780	$556,321	$949,664	$2,680,921	182%	$1,758,301	$1,653,424	-6%
Moldova	15	$4,984,102	$1,828,742	$1,707,969	$1,264,824	$1,584,000	25%	$1,584,000	$604,800	-62%
Others		$12,098,372	$4,101,366	$1,825,473	$4,357,899	$3,018,184	-31%	$1,798,035	$1,536,565	-15%
Total		$378,775,232	$240,524,498	$202,323,135	$261,772,825	$244,105,627	-7%	$159,520,589	$157,993,785	-1%

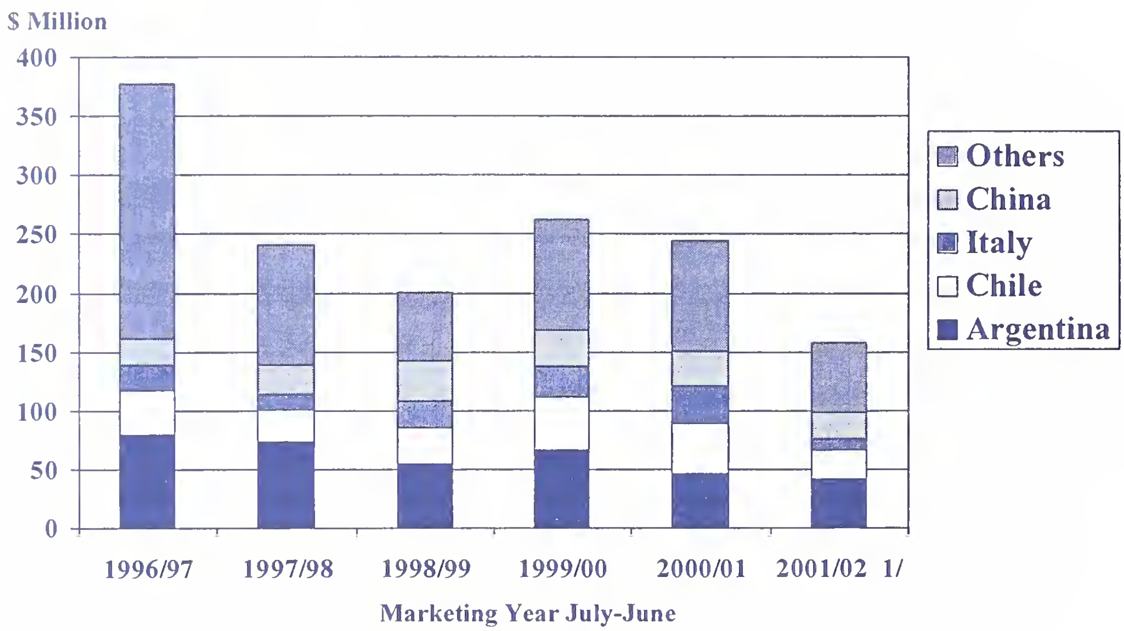
1/ Ranked by descending order of total value of supplied product in marketing year 2000/01.
2/ Percentage changed from Marketing Year 1999/01/00 to 2000/01.
3/ Percentage changed from Jul-Feb 2000/01 period to Jul-Feb 2001/02.

U.S. Apple Juice Imports
Marketing Years 1996/97-2000/01 and year to date
(July-June)
Average Price (U.S. $) Per Ton
Top 15 Suppliers

Country	Rank by $ per Ton 1/	1996/97	1997/98	1998/99	1999/00	2000/01	Percent Changed 2/	Jul-Feb 2000/01	Jul-Feb 2001/02	Percent Changed 3/
China	1	$1,970	$1,125	$785	$1,053	$836	-21%	$861	$756	-12%
New Zealand	2	$1,703	$1,170	$931	$987	$927	-6%	$1,010	$810	-20%
Hungary	3	$1,621	$1,062	$811	$1,248	$958	-23%	$950	$1,211	27%
Argentina	4	$1,473	$1,122	$911	$1,048	$1,004	-4%	$1,219	$755	-38%
Turkey	5	$1,837	$1,403	$832	$1,085	$1,058	-2%	$1,032	$827	-20%
Germany	6	$1,898	$1,709	$1,063	$1,352	$1,080	-20%	$1,114	$977	-12%
Brazil	7	$1,784	$1,094	$712	$1,149	$1,094	-5%	$961	$1,155	20%
Italy	8	$1,809	$1,415	$1,097	$1,374	$1,141	-17%	$1,221	$1,197	-2%
Austria	9	$1,853	$1,720	$1,162	$1,463	$1,181	-19%	$1,242	$1,315	6%
Chile	10	$1,838	$1,415	$951	$1,098	$1,229	12%	$1,424	$836	-41%
South Africa	11	$1,980	$1,345	$835	$1,192	$1,261	6%	$1,363	$911	-33%
Poland	12	$1,880	$5,503	$1,115	$1,450	$1,320	-9%	$1,476	$973	-34%
Moldova	13	$2,021	$1,756	$1,381	$2,185	$1,380	-37%	$1,380	$819	-41%
Mexico	14	$2,226	$1,592	$1,231	$1,313	$1,417	8%	$1,282	$1,733	35%
Canada	15	$2,558	$2,254	$2,290	$2,097	$2,139	2%	$2,054	$2,199	7%

1/ Ranked by ascending order of averaged price per ton of supplied product in marketing year 2000/01.
2/ Percentage changed from Marketing Year 1999/01/00 to 2000/01.
3/ Percentage changed from Jul-Feb 2000/01 period to Jul-Feb 2001/02.

The Value of U.S. Imports of Apple Juice Has Declined

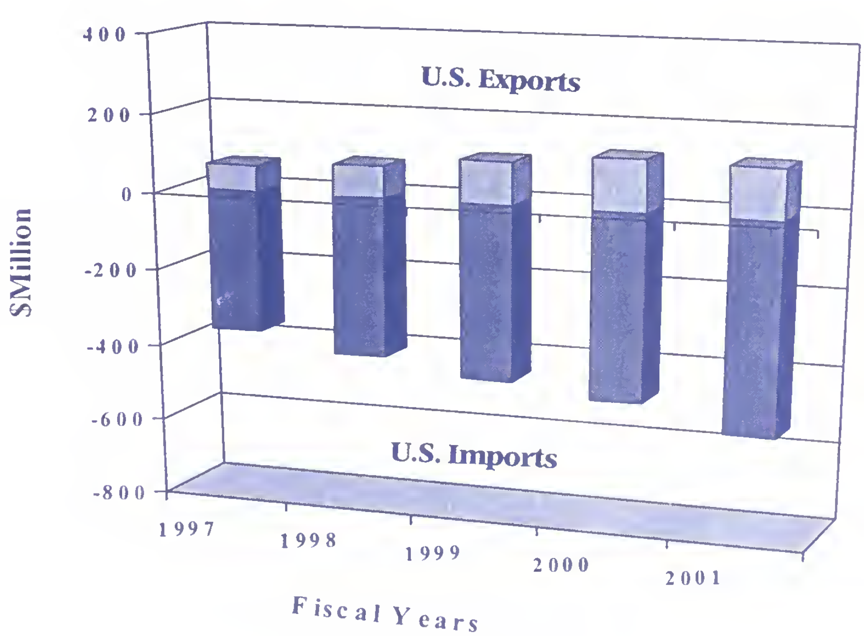


1/ Average import value for the period July 2001 to February 2002.
Source: U.S. Department of Commerce, Bureau of the Census

U.S. Horticultural Trade with Members of the Proposed U.S./Central America Free Trade Agreement

Trade in horticultural products has become increasingly important between the United States and the Central American region. In FY 2001, horticultural products accounted for about 13 percent of total U.S. agricultural exports to the region. This figure compares with 10 percent in FY 1995. On the other hand, about 30 percent of all U.S. agricultural imports from the region were horticultural products in FY 2001. On January 16, 2002, President Bush announced that the United States would explore a free trade agreement with the countries of Central America, to enhance our economic relations in the region and advance free trade around the world.

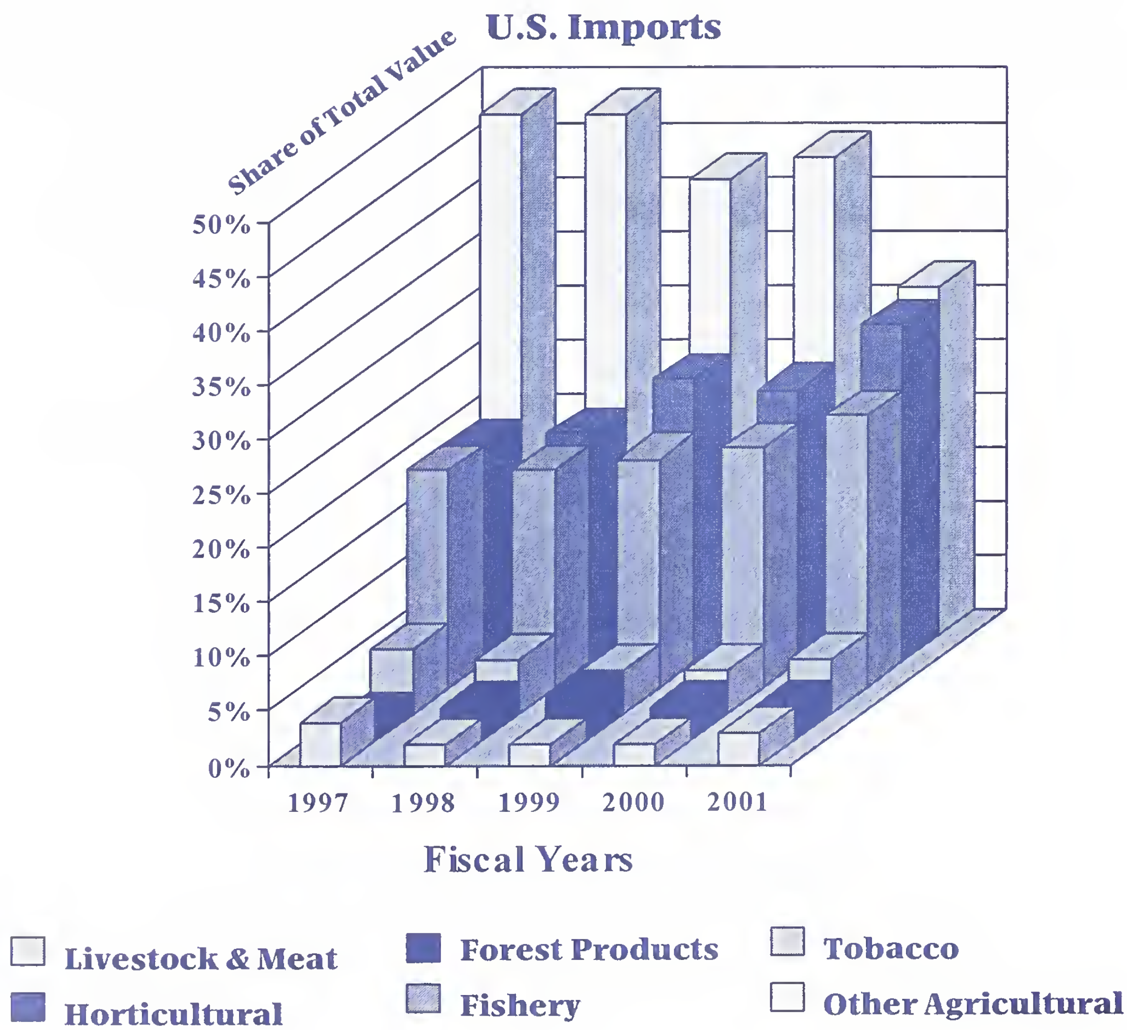
U.S. Horticultural Trade Balance with Central America



Source: U.S. Department of Commerce, Bureau of the Census

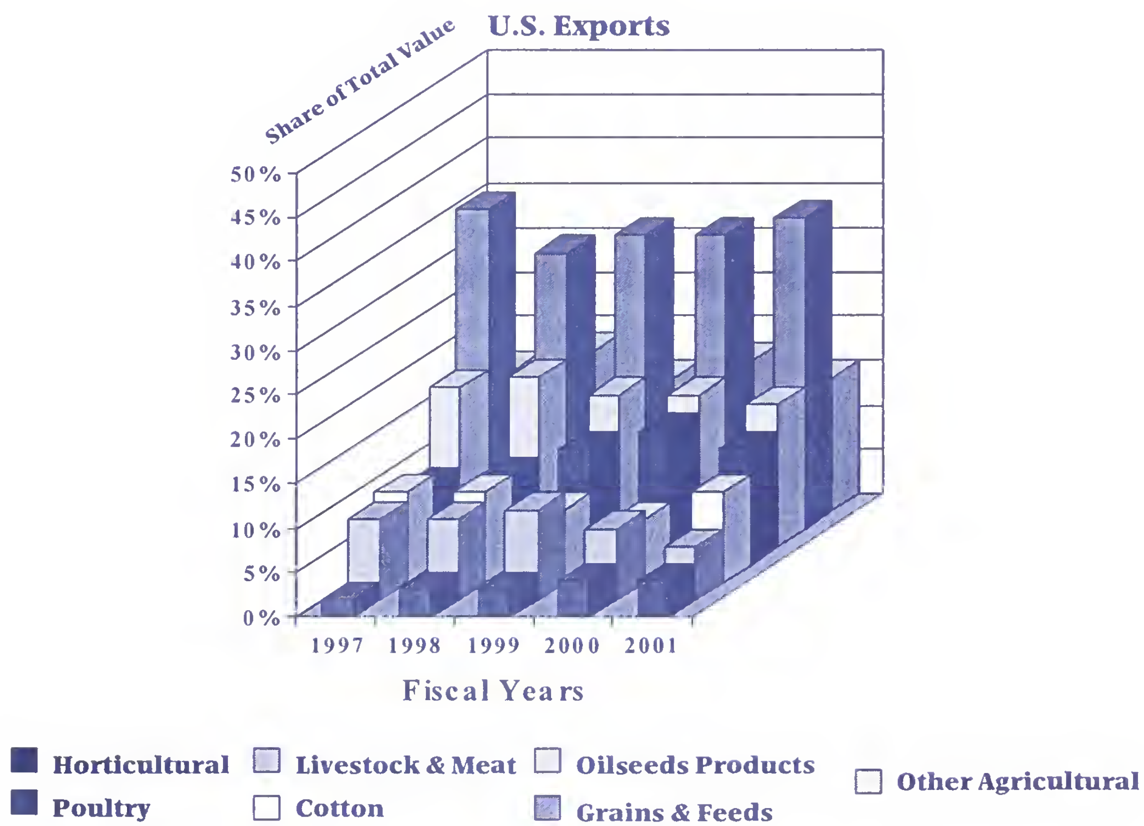
Horticultural Products Play Key Role in U.S/Central America Agricultural Trade

Source: U.S. Department of Commerce, Bureau of the Census



Horticultural Products Play Key Role in U.S/Central America Agricultural Trade

Source: U.S. Department of Commerce, Bureau of the Census



Source: U.S. Department of Commerce, Bureau of the Census

In FY 2001, horticultural products accounted for about 13 percent of total U.S. agricultural exports to the Central American region. On the other hand about 30 percent of all U.S. agricultural imports from the region were horticultural products.

Combined, U.S. imports of horticultural products from Costa Rica, Guatemala, El Salvador, Honduras, and Nicaragua have almost doubled in the last 7 fiscal years, excluding bananas. Likewise, U.S. exports have increased. In FY 2001, U.S. shipments of fresh and processed fruits and vegetables to these countries were valued at $175 million.

U.S. imports of horticultural products from the proposed members were valued at $597 million, excluding banana trade. It is clear that the United States runs a horticultural trade deficit with the 5 proposed members of a U.S./Central America Free Trade Agreement. This deficit reached a record $421 million in FY 2001.

Guatemala is the major export market among the proposed members. In FY 2001, total U.S. exports of horticultural products to Guatemala were valued at $45 million. On the other hand, Costa Rica is the main supplier of horticultural products to the United States, supplying $340 million in FY 2001, excluding bananas.

Overall U.S. Exports of Agricultural Products to Members of the Proposed U.S/Central America Free Trade Agreement Fiscal Years 1997-2001 Value in $1,000

Products	RANK 2001	1997	1998	1999	2000	2001	% Change 2000-2001
Grains & Feeds	1	$422,397	$402,011	$424,628	$422,539	$474,748	12%
Oilseeds & Products	2	$212,145	$237,293	$218,517	$209,204	$212,358	2%
Horticultural Products	3	**$105,813**	**$128,367**	**$166,126**	**$186,345**	**$175,231**	**-6%**
Cotton	4	$121,820	$126,870	$103,502	$90,059	$135,593	51%
Livestock & Meats	5	$102,946	$119,388	$125,814	$102,829	$86,113	-16%
Poulty & Products	6	$25,215	$38,658	$41,152	$45,159	$55,327	23%
Other 1/	7	$192,600	$225,692	$194,102	$209,968	$208,083	-1%
Grand Total		**$1,182,934**	**$1,278,279**	**$1,273,841**	**$1,266,102**	**$1,347,451**	6%

1/ Other Include Dairy Products, Forest Products, Tobacco & Products, Fishery Products, Planting Seeds, and Sugar & Tropical Products.

Source: U.S. Department of Commerce, Bureau of the Census

On average, processed horticultural products account for about one third of total U.S. exports to Central America (excluding Panama and Belize). The value of processed fruits and vegetables exported to the region reached nearly $80 million in FY 2001. Frozen potato fries are the main processed vegetable exported. Orange juice is the major processed fruit product shipped to Central America. Apples are the main fresh fruit exported.

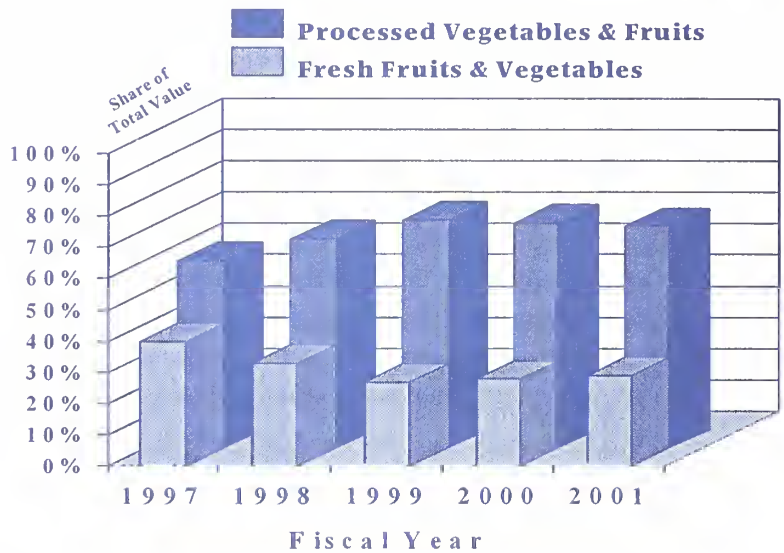
The bulk of U.S. imports of horticultural products from Central America are composed of fresh fruits and vegetables, excluding bananas. The total value of U.S. imports of fresh horticultural products from the region reached $360 million in FY 2001. Some major fresh horticultural products imported included fresh melons ($135 million) and fresh pineapples ($131 million). Costa Rica is the major supplier of fresh fruits and vegetables from the region.

Overall U.S. Imports of Agricultural Products from Members of the Proposed U.S/Central America Free Trade Agreement Fiscal Years 1997-2001 Value in $1,000

Products	RANK 2001	1997	1998	1999	2000	2001	%Change 2000-2001
Horticultural Products	1	**$411,829**	**$452,366**	**$497,933**	**$529,675**	**$596,645**	**13%**
Fishrey Products	2	$416,156	$434,347	$400,586	$459,721	$487,261	6%
Tobacco & Products	3	$133,650	$117,083	$82,534	$87,829	$89,435	2%
Forest Products	4	$45,604	$57,815	$67,631	$57,808	$66,791	16%
Livestock & Meats	5	$74,023	$44,952	$40,676	$49,325	$57,247	16%
Grains & Feeds	5	$4,431	$4,625	$6,091	$6,865	$9,052	32%
Other 1/	6	$999,042	$1,031,892	$783,347	$939,099	$608,169	-35%
Grand Total		$2,084,872	$2,145,200	$1,880,683	$2,131,896	$1,914,553	-10%

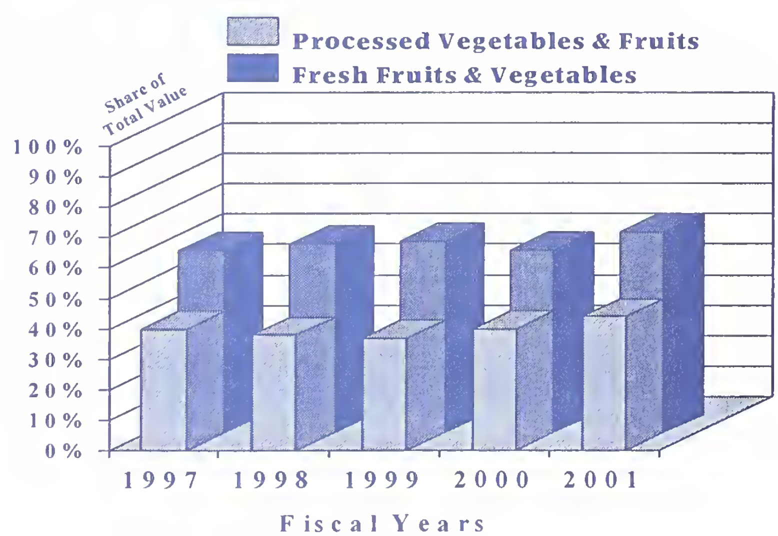
1/ Other Include Dairy Products, Oilseeds & Products, Poultry & Products, Cotton, Planting Seeds, and Sugar & Tropical Products
Source: U.S. Department of Commerce, Bureau of the Census

Processed Products Account for the Bulk of U.S. Horticultural Exports to Central America



Source: U.S. Department of Commerce, Bureau of the Census

Fresh Fruits and Vegetables Dominate The U.S. Horticultural Import Market from Central America



Source: U.S. Department of Commerce, Bureau of the Census

U.S. Trade Balance with Members of the Proposed U.S/Central America Free Trade Agreement Fiscal Years 1997-2001 Value in $,000

	1997	1998	1999	2000	2001	% Change 2000-2001
orticultural Product Imports	$411,829	$452,366	$497,933	$529,675	$596,645	13%
orticultural Product Exports	$105,813	$128,367	$166,126	$186,345	$175,231	-6%
Trade Balance	*-$306,016*	*-$323,999*	*-$331,807*	*-$343,330*	*-$421,414*	23%
All Agricultural Imports	$2,084,872	$2,145,200	$1,880,683	$2,131,896	$1,914,553	-10%
All Agricultural Exports	$1,182,934	$1,278,279	$1,273,841	$1,266,102	$1,347,451	6%
Trade Balance	*-$901,938*	*-$866,921*	*-$606,842*	*-$865,794*	*-$567,102*	-34%

Source: U.S. Department of Commerce, Bureau of the Census

U.S. Exports of Selected Horticultural Products to Members of the Proposed U.S/Central America Free Trade Agreement Fiscal Years 1997-2001 Value in $1,000

Products	RANK 2001	1997	1998	1999	2000	2001	%Change 2000-2001
COSTA RICA							
Apples	1	$3,269	$3,470	$3,045	$3,819	$3,722	-3%
Table Grape	2	$1,996	$2,272	$1,945	$2,635	$3,627	38%
Potato Chips	3	$367	$276	$704	$756	$1,101	46%
Pears	4	$324	$487	$326	$290	$948	227%
Frozen Fries	5	$321	$426	$919	$830	$941	13%
Peaches/Nectarines	6	$276	$246	$438	$465	$506	9%
Wine	7	$166	$510	$1,012	$642	$452	-30%
Apple Juice	8	$531	$439	$413	$517	$326	-37%
Dried Fruit	9	$152	$521	$97	$358	$272	-24%
Almond	10	$108	$105	$126	$145	$270	86%
Plum/Prune	11	$47	$45	$149	$116	$98	-16%
Potatoes	12	$143	$463	$516	$441	$58	-87%
All Citrus	13	$0	$30	$34	$0	$53	N/A
Frozen Fruit	14	$0	$0	$50	$3	$40	1233%
Canned Mushrooms	15	$6	$25	$23	$22	$34	55%
Apricot	16	$24	$0	$8	$83	$32	-61%
Kiwifruit	17	$24	$5	$0	$0	$20	N/A
Carrots	18	$0	$0	$0	$0	$16	N/A
Asparagus	19	$32	$0	$61	$86	$0	-100%
Cherries	20	$0	$10	$3	$21	$0	-100%
Peppers	21	$0	$0	$24	$20	$0	-100%
EL SALVADOR							
Table Grapes	1	$958	$1,368	$2,207	$3,096	$3,820	23%
Apples	2	$306	$876	$1,772	$1,936	$1,880	-3%
Frozen Fries	3	$536	$221	$701	$607	$838	38%
Peaches/Nectarines	4	$113	$101	$126	$202	$271	34%
Drie Fruits	5	$50	$49	$155	$169	$163	-4%
Plum/Prunes	6	$0	$40	$112	$119	$135	13%
Wine	7	$306	$239	$198	$145	$124	-14%
Pears	8	$3	$38	$27	$76	$75	-1%
Almonds	9	$0	$0	$0	$51	$44	-14%
Potatoes	10	$0	$0	$115	$140	$42	-70%
Potato Chips	11	$43	$109	$0	$11	$8	-27%
Frozen Fruits	12	$0	$41	$125	$0	$5	N/A
Canned Mushrooms	13	$0	$3	$25	$3	$3	0%
All Citrus	14	$0	$21	$4	$3	$3	0%
Apple Juice	15	$16	$27	$133	$43	$3	-93%
Asparagus	16	$0	$12	$6	$7	$0	-100%
Peppers	17	$118	$22	$30	$0	$0	N/A
GUATEMALA							
Table Grapes	1	$4,104	$3,959	$4,472	$5,587	$5,267	-6%
Apples	2	$5,022	$4,231	$3,620	$3,036	$3,626	19%
Frozen Fries	3	$844	$493	$554	$578	$1,408	144%
Potato Chips	4	$491	$446	$1,459	$1,013	$1,002	-1%
Dried Fruits	5	$62	$107	$340	$311	$412	32%
Peaches/Nectarines	6	$208	$365	$494	$491	$390	-21%
Pears	7	$284	$328	$149	$204	$246	21%

U.S. Exports of Selected Horticultural Products to Members of the Proposed U.S/Central America Free Trade Agreement Fiscal Years 1997-2001 Value in $1,000

Products	RANK 2001	1997	1998	1999	2000	2001	%Change 2000-2001
GUATEMALA (cont)							
Wine	8	$293	$298	$222	$289	$245	-15%
Plum/Prunes	9	$174	$84	$83	$78	$69	-12%
All Citrus	10	$35	$36	$74	$73	$44	-40%
Almonds	11	$30	$208	$175	$10	$34	240%
Potatoes	12	$0	$9	$13	$33	$13	-61%
Kiwifruits	13	$0	$0	$3	$0	$6	N/A
Canned Mushrooms	14	$17	$156	$12	$4	$3	-25%
Carrots	15	$0	$0	$0	$6	$3	-50%
Apple Juice	16	$10	$145	$48	$21	$0	-100%
Apricots	17	$0	$0	$0	$9	$0	-100%
Cauliflower	18	$0	$0	$17	$0	$0	N/A
Cherries	19	$0	$0	$3	$6	$0	-100%
Frozen Fruits	20	$0	$27	$15	$3	$0	-100%
Peppers	21	$0	$0	$4	$0	$0	N/A
HONDURAS							
Apples	1	$1,160	$1,271	$1,858	$1,651	$1,845	12%
Table Grapes	2	$520	$1,315	$671	$875	$978	12%
Frozen Fries	3	$85	$266	$989	$776	$407	-48%
Potato Chips	4	$50	$121	$389	$359	$254	-29%
Wine Exports	5	$219	$263	$200	$483	$237	-51%
Dried Fruits	6	$271	$184	$227	$198	$204	3%
Apple Juice	7	$315	$127	$44	$16	$50	213%
Potatoes	8	$0	$25	$56	$0	$25	N/A
Peaches/Nectarines	9	$0	$0	$0	$7	$22	214%
Pears	10	$168	$89	$61	$122	$19	-84%
Canned Mushrooms	11	$5	$6	$6	$17	$17	0%
Plum/Prunes	12	$0	$3	$0	$8	$8	0%
Frozen Fruits	13	$0	$7	$0	$0	$5	N/A
Almonds	14	$0	$24	$26	$12	$0	-100%
Apricots	15	$0	$8	$0	$0	$0	N/A
Asparagus	16	$0	$0	$0	$0	$0	N/A
Broccoli	17	$0	$6	$5	$0	$0	N/A
Cauliflower	18	$0	$0	$0	$0	$0	N/A
All Citrus	19	$153	$0	$66	$0	$0	N/A
Peppers	20	$0	$0	$0	$0	$0	N/A
NICARAGUA							
Apples	1	$307	$261	$382	$525	$353	-33%
Frozen Fries	2	$48	$0	$134	$305	$313	3%
Dried Fruits	3	$125	$98	$126	$134	$162	21%
Table Grapes	4	$24	$105	$155	$250	$154	-38%
Potato Chips	5	$41	$64	$99	$115	$117	2%
Wine	6	$0	$41	$213	$107	$71	-34%
Canned Mushrooms	7	$0	$0	$0	$0	$37	N/A
Almonds	8	$46	$9	$5	$5	$11	120%
Apple Juice	9	$0	$0	$0	$27	$0	-100%
Peaches/Nectarines	10	$0	$0	$0	$0	$0	N/A
Pears	11	$0	$0	$226	$3	$0	-100%
Potatoes	12	$0	$168	$276	$0	$0	N/A
GRAND TOTAL		$25,343	$27,843	$33,599	$35,605	$37,989	7%

U.S. Imports of Selected Horticultural Products from Members of the Proposed U.S/Central America Free Trade Agreement Fiscal Years 1997-2001 Value in $1,000

Products	RANK 2001	1997	1998	1999	2000	2001	%Change 2000-2001
COSTA RICA							
Fresh Pineapple	1	$56,057	$63,604	$103,562	$98,213	$127,300	30
Cantaloupes	2	$25,151	$22,022	$26,620	$31,841	$50,387	58
Frozen Fruits	3	$372	$547	$861	$372	$628	69
Carrots	4	$16	$0	$171	$121	$411	239
Canned Pineapples	5	$99	$70	$3	$245	$328	34
Cucumbers	6	$0	$0	$0	$0	$201	N/A
Asparagus	7	$44	$0	$0	$0	$11	N/A
Apple Juice	8	$0	$30	$0	$0	$0	N/A
Canned Corn	9	$0	$1	$0	$0	$0	N/A
Garlic	10	$0	$0	$0	$0	$0	N/A
Strawberries	11	$19	$0	$0	$0	$0	N/A
Avocados	12	$0	$2	$13	$25	$0	-100
EL SALVADOR	1						
Frozen Fruits	2	$49	$54	$147	$432	$294	-32
Apple Juice	3	$0	$0	$2	$21	$30	44
Cantaloupes	4	$60	$0	$0	$0	$0	N/A
Fresh Pineapples	5	$1,030	$705	$138	$0	$0	N/A
GUATEMALA							
Cantaloupes	1	$21,621	$22,883	$28,202	$37,161	$32,155	-13
Frozen Fruits	2	$262	$480	$631	$952	$894	-6
Cucumbers	3	$287	$222	$48	$239	$792	232
Fresh Pineapples	4	$42	$34	$500	$140	$529	278
Asparagus	5	$424	$491	$315	$276	$254	-8
Broccoli	6	$0	$59	$0	$21	$41	95
Canned Mushrooms	7	$0	$0	$0	$3	$17	561
Apple Juice	8	$0	$12	$10	$19	$8	-61
Canned Pineapples	9	$0	$0	$0	$0	$5	N/A
Almonds	10	$47	$0	$0	$0	$0	N/A
Apples	11	$0	$0	$0	$38	$0	-100
Canned Corn	12	$0	$0	$0	$3	$0	-100
Garlic	13	$0	$0	$0	$0	$0	N/A
Strawberries	14	$17	$0	$0	$0	$0	N/A
		$0	$0	$0	$0	$0	N/A
HONDURAS							
Cantaloupes	1	$16,626	$22,576	$15,902	$17,697	$23,380	32
Pineapples	2	$6,459	$8,023	$7,489	$7,659	$7,213	-6
Cucumbers	3	$916	$1,114	$1,049	$978	$1,145	17
Frozen Fruits	4	$4	$0	$0	$8	$28	267
Apple Juice	5	$0	$0	$15	$0	$0	N/A
Pineapples	6	$19	$0	$38	$0	$0	N/A
Peppers	7	$0	$0	$0	$0	$0	N/A
Avocado	8	$0	$0	$0	$0	$0	N/A
NICARAGUA							
Asparagus	1	$0	$0	$0	$60	$603	908
Cantaloupes	2	$1,639	$751	$532	$1,024	$384	-62
Frozen Fruits	3	$46	$17	$53	$22	$38	77
Cucumbers	4	$19	$26	$28	$10	$0	-100
Pineapples	5	$0	$0	$0	$0	$0	N/A
Strawberries	6	$2	$0	$0	$0	$0	N/A
GRAND TOTAL		$131,327	$143,725	$186,330	$197,578	$247,077	25

Source: U.S. Department of Commerce, Bureau of the Census

U.S. Horticultural Exports to the Middle East and North African Countries Register 5-Year Growth

U.S. exports of horticultural products in CY 2001 to the Middle East and North African countries were valued at $260 million, down slightly from the previous year, but up 15 percent from 1997. Israel, United Arab Emirates, Saudi Arabia, Egypt, Kuwait, and Jordan were the leading markets for most product categories. Edible tree nuts, valued at $77 million, topped the export list, followed by miscellaneous fruit and vegetables at $65 million, deciduous fresh fruits at $27 million, and prepared and preserved vegetables at $25 million. Other horticultural exports to these same markets with lesser values, included fruit and vegetable juices at $10 million, dried fruits at $6 million, and fresh vegetables, excluding potatoes, at $5 million. U.S. horticultural product exports to these markets are expected to continue to increase as new market opportunities are developed. Exports are expected to benefit from duty-free access, free-trade agreements, and/or production shortfalls due to weather-related conditions. The European Union and neighboring Middle East countries are the chief competitors for U.S. horticultural products exported to this region.

Background

U.S. horticultural product exports to the Middle East and North African countries in CY 2001 were valued at $260 million, down 1 percent from the record value in 2000, but up 15 percent from 1997. The growth of U.S. horticultural product exports during this 5–year period has been attributed mostly to a steady increase in shipments of edible tree nuts, miscellaneous fruit and vegetable products, and fresh vegetables, excluding potatoes. Other horticultural exports, i.e., frozen, dried/dehydrated vegetables, miscellaneous prepared fruits and hops helped fuel the growth during this period. During this same period, U.S. exports of wine and wine products to these markets increased to $1.2 million from $770,000 in 1997, with the Middle East countries purchasing the bulk of these sales. Israel and the United Arab Emirates were the region's best customers for edible tree nut exports, with U.S. sales valued at $30 million and $28 million, respectively. Other important but smaller tree nut customers were Saudi Arabia ($8 million), Egypt ($5 million), Jordan and Lebanon ($3 million each). U.S. exports of prepared and preserved vegetables, fresh deciduous fruits, fruits and vegetable juices and dried fruits to these markets declined slightly in 2001.

Market Profile

Marketing of horticultural products in the Middle East and North African countries takes place primarily in outdoor street stalls. These countries exhibit a growing demand by the wealthy for higher quality produce. In Egypt, there have been significant changes made recently in the marketing of horticultural produce. For example, specialty shops and supermarkets represent new and developing point-of-purchase sales outlets. Also, domestically produced vegetables, such as tomatoes, cucumbers, peppers and melons, grown under plastic, can now be supplied virtually year round by local farmers. In Yemen, tribal chiefs have been encouraging vegetable farmers producing Red Puna and Texas Grano varieties of onions to band together and market their onion crops in a

consolidated manner. Reportedly, these onion growers now produce and transport their onions in 1-ton trucks to distant city markets with great success. In Morocco, most fruits and vegetables are produced and consumed fresh, with frozen vegetables being sold only in small quantities at top-notch supermarkets. Although Morocco produces most of its own apples and pears, there is a small niche market for high quality apples and pears. Recently, Morocco imported unspecified quantities of both apples and pears from France, Chile, and Spain. Dried fruit and nuts (almonds, peanuts, pistachios and hazelnuts) are a major snack food in Morocco and are eaten preferably roasted with salt. Dried prunes and raisins are not sold as snack foods, but are cooked with beef and other dishes during special occasions, which makes these products rather seasonal. Morocco is also a large producer and exporter of fruit and vegetables.

Algeria, a smaller buyer of U.S. horticultural products, produces and consumes most of its output of fresh fruits and vegetables. However, Algeria imports some vegetables, such as onions, garlic, and fresh tomatoes, when the crop harvest falls below normal. Most fresh fruits--citrus, grapes, medlar, strawberries, pears, apricots, peaches, cherries, apples, and melons--consumed in Algeria are produced locally. Other fresh fruits, such as bananas, pineapple, kiwifruit, apples, and strawberries are imported during the off-season. Algeria also imports some dried fruits--almonds, pistachio, peanuts, raisins, walnuts and hazelnuts--when local production does not meet local demand. Canned fruits (pineapple, peaches, etc.) are mostly imported. Most canned vegetables are produced and processed by locally canneries, but some are also imported.

Key Factors Affecting the Growth of U.S. Horticultural Trade in the Middle East and North Africa

- Low price of horticultural products from neighboring and traditional suppliers;
- Strong U.S. dollar compared to regional currencies; and
- Tariffs and SPS issues.

Trade Agreements

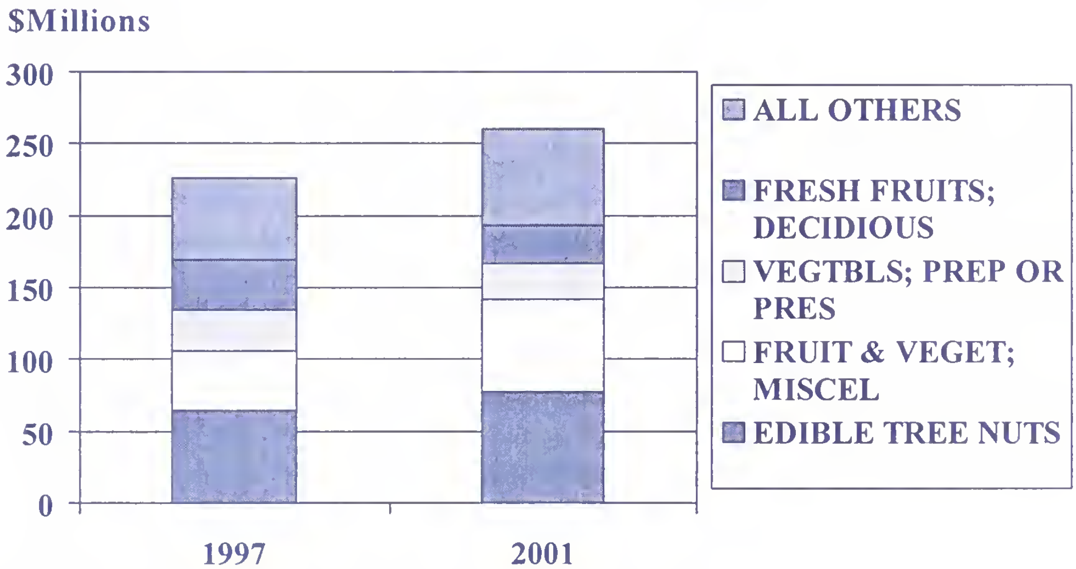
The U.S.-Jordan Free Trade Agreement (FTA), entered into force on December 17, 2001. The FTA will eliminate duties and commercial barriers to bilateral trade goods and services originating in the United States and Jordan. Current tariffs less than 5 percent will be phased out in two years. Tariffs between 5 and 10 percent will be eliminated in 4 years and those between 10 and 20 percent will be eliminated in 5 years. Tariffs more than 25 percent will be eliminated in ten years. Other provisions address intellectual property rights protection, balance of payments, rules of origin, safeguards and procedural matters such as consultations and dispute settlement.

The U.S.-Israel Agreement on Trade in Agricultural Products (ATAP), enacted in November 1996, is an auxiliary agreement to the U.S.-Israel free trade agreement. The ATAP, a 5-year agreement, was extended through December 31, 2002, to allow both parties an opportunity to negotiate in the pursuit of further improvements in the Agreement. The ATAP established 3 categories of coverage for U.S. products exported to Israel: products free from tariff restrictions; products imported free of tariffs within certain quotas; and products to be imported at a preferential rate. Among the more important products receiving duty-free treatment within tariff rate quotas (TRQ's) are chilled and frozen beef, fresh and processed poultry, apples, grapes, pears, citrus (all types), sunflower seeds, cheese, and

selected fresh and frozen vegetables. Other provisions under the Agreement call for reductions in tariffs for U.S. wine products.

On April 23, 2002, President Bush, informed His Majesty King Mohammed VI of Morocco that the United States will work with his government to enact a U.S.-Morocco free trade agreement. Specific details and/or time frame have not been developed as of yet.

U.S. Horticultural Product Exports to the Middle East and North Africa



Source: U.S. Department of Commerce, Bureau of the Census

(The FAS GAIN Report search engine contains information on U.S. Horticultural Products exports to the Middle East and North African countries. For information on production and trade, contact Emanuel McNeil at 202-720-2083. For information on marketing contact Steve Shnitzler at 202-702-8495).

SELECTED U.S. HORTICULTURAL EXPORTS TO THE MIDDLE-EAST AND NORTH AFRICA, CALENDAR YEAR, DOLLAR VALUE

COMMODITY AND DESTINATION	1997	1998	1999	2000	2001
Edible Tree Nuts 1/	**64,475,119**	**65,149,364**	**54,594,988**	**73,281,112**	**77,209,707**
Israel	29,051,655	29,446,373	24,805,737	27,640,218	29,787,824
United Arab Emirates	16,348,868	18,694,594	15,929,030	26,320,686	28,093,344
Saudi Arabia	6,430,056	7,617,815	5,625,219	8,122,898	8,720,366
Egypt	5,384,505	4,398,825	5,468,775	5,193,732	4,725,431
Jordan	2,690,593	828,288	2,067,695	3,101,213	3,174,698
Turkey	840,177	924,846	1,035,441	1,582,061	1,633,936
Tunisia	307,300	451,156	640,684	373,075	1,487,636
Others	3,421,965	2,787,467	977,593	947,229	413,528
Fruit & Vegetables; Misc. 2/	**41,796,288**	**53,032,609**	**60,867,572**	**63,421,252**	**64,704,884**
Bahrain	2,106,357	1,755,143	2,380,275	2,493,057	4,188,493
Egypt	2,177,211	3,618,945	3,114,198	2,371,119	2,440,026
Israel	20,472,043	18,691,396	16,548,843	10,841,916	12,530,728
Jordan	723,518	617,536	676,756	1,774,946	1,199,398
Kuwait	823,066	3,340,671	1,738,814	4,405,550	7,074,552
Lebanon	1,409,812	1,408,661	2,536,064	4,837,983	2,060,207
Oman	793,046	1,059,187	1,177,353	1,221,196	1,913,307
Qatar	736,807	378,269	731,938	878,901	1,043,693
Saudi Arabia	6,890,278	10,162,133	17,333,355	18,011,270	16,167,575
Turkey	480,831	1,947,405	3,475,758	3,492,138	1,614,718
United Arab Emirates	4,208,583	7,792,333	9,599,516	11,743,155	14,006,442
Others	40,821,552	50,771,679	59,312,870	62,071,231	64,239,139
Vegetables; Prep. Or Pres. 3/	**28,483,907**	**29,331,509**	**27,816,414**	**30,570,151**	**24,519,744**
Bahrain	777,018	823,014	542,076	956,544	885,755
Egypt	405,092	390,888	591,503	218,231	318,460
Israel	4,276,534	4,394,357	5,120,252	7,102,187	4,538,207
Jordan	319,412	294,902	248,870	695,944	508,602
Kuwait	3,116,053	3,173,391	3,062,272	3,348,745	4,009,404
Lebanon	1,428,867	1,273,278	908,869	543,979	597,202
Oman	1,654,167	1,668,261	850,927	907,451	595,672
Qatar	407,410	415,767	734,265	508,517	680,780
Saudi Arabia	10,291,209	10,222,278	9,915,009	10,578,678	8,268,797
United Arab Emirates	4,779,951	5,586,653	4,873,145	3,398,762	3,630,500
Yemen	338,942	355,413	351,060	189,125	178,051
Others	689,252	733,307	618,166	2,121,988	308,314
Fresh Fruits; Deciduous 4/	**34,241,616**	**39,871,939**	**40,499,986**	**29,458,026**	**27,078,781**
Bahrain	462,218	555,468	590,041	1,118,716	422,820
Egypt	2,314,818	1,742,079	5,256,247	2,253,937	2,476,208
Israel	4,793,638	3,082,716	6,676,092	2,262,890	3,230,654
Kuwait	2,111,560	1,507,292	1,522,460	1,455,460	1,434,616
Saudi Arabia	14,135,153	18,445,093	15,785,454	9,825,514	6,090,000
United Arab Emirates	10,424,229	14,150,529	10,327,936	11,941,199	12,735,570

Others	0	388,762	341,756	600,310	688,913
Fruit & Vegetable Juices 5/	**7,789,127**	**8,112,141**	**11,398,020**	**10,983,020**	**9,720,429**
Bahrain	83,701	50,070	212,869	96,421	416,951
Israel	1,890,996	2,069,105	5,479,710	4,637,325	2,320,190
Kuwait	81,354	80,238	72,073	216,338	315,558
Lebanon	260,669	188,294	228,779	116,407	309,950
Oman	112,453	174,744	52,428	102,192	381,149
Saudi Arabia	1,433,566	1,562,733	1,663,824	1,640,687	1,406,727
United Arab Emirates	3,240,455	3,388,905	3,306,050	3,841,296	4,355,889
Others	685,933	598,052	383,108	332,354	214,015
Fresh Vegetables 6/	**3,038,093**	**2,992,923**	**3,703,818**	**4,522,400**	**5,352,112**
Bahrain	145,598	13,500	19,952	12,764	73,460
Israel	333,259	48,548	168,812	102,341	265,794
Kuwait	774,977	811,167	1,234,208	2,137,581	2,250,115
Saudi Arabia	147,515	129,677	156,436	307,965	425,619
United Arab Emirates	1,547,483	1,918,213	1,864,372	1,837,134	2,232,675
Others	89,261	71,818	260,038	124,615	104,449
Dried Fruit 7/	**7,025,848**	**6,978,720**	**6,415,537**	**7,143,494**	**6,276,023**
Egypt	973,508	950,489	978,183	1,010,184	410,091
Israel	4,203,896	4,201,132	4,240,316	4,469,551	4,711,662
Saudi Arabia	641,216	677,408	353,475	508,324	375,689
Turkey	451,405	486,437	539,111	542,454	468,459
United Arab Emirates	205,103	427,833	130,147	429,389	183,826
Others	550,720	235,421	174,305	183,592	126,296
ALL OTHERS	**40,905,348**	**42,669,321**	**49,978,859**	**43,994,596**	**45,327,192**
GRAND TOTAL	**226,781,838**	**248,138,526**	**255,275,194**	**263,374,051**	**260,188,872**

Source: U.S. Department of Commerce, Bureau of the Census. 1/ Edible tree nuts (mostly almonds, walnuts, pecans, and small quantities of pistachios); . 2/ Fruit & Vegetables; Misc (potato chips, frozen and other food preps, mixed seasonings, and beer/malt); . 3/ Vegetables; Prep. Or Pres (tomato ketchup, sauce and paste, and canned tomatoes, sweet corn and beans, and potatoes nes); 4/ Fresh Fruits; Deciduous (mostly apples and pears); 5/ Fruit & Vegetable Juices (frozen orange juice, apple and grape juice and mixed fruit juices); 6/ Fresh Vegetables (carrots, onions, lettuce, sweet corn and beans); 7/ Dried Fruit (mostly raisins/prunes, and apples).

World Trade Situation and Policy Updates

ITC VOTES THAT CANADA'S GREENHOUSE TOMATOES DO NOT INJURE U.S. INDUSTRY

On April 2, 2002, the International Trade Commission (ITC) voted 4-1 that greenhouse tomato imports from Canada do not injure the U.S. industry. This final injury determination effectively terminates the U.S. dumping case against Canadian product, which was originally filed in March 2001. The ITC has scheduled for April 26 the release of its report containing the views of the Commission and information developed during the investigation.

U.S. LETTUCE PRICES TRENDING DOWN

A cold weather snap in Central California and Arizona in late January 2002, reduced the harvest area for winter–season salad vegetables, which included broccoli, cauliflower, carrots and lettuce. Head lettuce supplies were hardest hit by the cold snap, where temperatures dropped below the freezing mark. The resulting losses caused farm prices of iceberg lettuce to soar in mid-March on occasions to over $60.00 per 50-pound carton (24 heads per box), nearly 4 times the normal for the month, according to AMS's Market News Service. In early February, iceberg lettuce prices on average were approximately $9.00 per carton. As of April 2, prices of head lettuce had started to trend down to about $15.00-20.00 per carton, still slightly above normal for the month. As supplies recover, retail prices of iceberg lettuce, which nearly doubled since January, are expected to return to more normal levels. This development is not expected to have significantly impacted U.S. lettuce sales abroad. U.S. exports of lettuce in CY 2001 were valued at $195 million, up 2 percent from the previous year.

FLORIDA COURT ORDERS REMEDY TO CITRUS EQUALIZATION TAX

On April 4, 2002, the 10th Judicial Circuit Court in Florida ordered the Florida Citrus Commission to propose a remedy in the Equalization Tax case. The court had ruled on March 15 that the equalization tax was unconstitutional because it illegally discriminated against foreign citrus products imported into Florida while it exempted imported juice products from other states, mostly California. Based on the ruling, the court was asked to order the Florida Department of Citrus (FDOC) to refund nearly $10 million in equalization taxes to its clients, the amount that the plaintiffs in the case have paid since filing the lawsuits in late 2000 and early 2001, plus 3 years in back taxes (the period of time limited by Florida tax laws.) Under a 1990 Supreme Court decision, the 10th District Court must give the Florida Citrus Commission the first opportunity to propose a remedy. The court gave the Citrus Commission until July to come up with a remedy. The remedy could include a complete refund to companies that paid the tax, back taxes against the companies' competitors who benefited from the tax exemption, or a remedy involving a combination of a tax refund and back taxes. In the wake of the court's March 15 ruling, the Florida legislature removed the tax exemption for domestic juice, with the new law scheduled to go into effect July 1, 2002.

In a related development, formal bilateral WTO consultations with Brazil regarding the Florida equalization were scheduled to take place in Geneva, Switzerland on May 20.

U.S. CANNED FRUIT INDUSTRY CONTINUES TO CONTRACT

Signature Fruit, the reorganized Tri-Valley Growers Cooperative, announced closure of its Gridley peach canning facility "in order for the company to operate more efficiently." This summer, Signature will operated only two canneries, employ about 4,000 people, and process about 200,000 tons of fruit compared to 1990 when the company operated 10 separate plants, employed 11,000 people, and processed over 1.3 million tons of fruit. The Gridley plant employed about 1,000 workers but only operated for about two weeks and accounted for a small percentage of Signature's total peach output. Signature will remain the largest of the United States' 4 fruit canners. The other canners, in order of size, are: Del Monte, Pacific Coast Canners, and California Fruit Packing Company. Reasons for the decline of the canning fruit industry are a trend toward off-season consumption of fresh produce, rising costs, and loss of the institutional market to increasing imports from the EU. In MY 1990, U.S. imports from the EU totaled $4.2 million; by MY 2000, imports totaled $19.6 million.

Top United States Horticultural Product Exports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Feb. FY 2001	Oct. - Feb. FY 2002
				--- 1,000 Dollars ---			
Almonds	879,032	772,891	696,818	580,815	682,680	339,841	369,316
Essential Oils	622,219	532,623	507,651	591,583	674,715	247,431	276,621
Wine & Wine Prdts	390,376	510,923	545,287	538,143	548,601	213,905	196,726
Fresh Apples	412,855	328,068	375,869	336,444	414,227	205,688	182,989
Fresh Grapes	313,836	274,953	283,865	332,162	390,322	191,958	194,261
Frz. Potato Fries	294,417	313,209	343,216	339,553	359,945	149,258	138,523
Oranges	308,055	339,114	159,585	268,808	304,406	110,487	112,371
Orange Juice All	305,172	295,564	307,165	290,395	251,043	107,104	88,470
Proc. Tomatoes	229,526	233,209	220,380	221,306	227,506	95,904	97,524
Nursery Products	185,316	220,055	229,737	216,722	215,261	98,376	84,411
Fresh Lettuce	146,640	173,746	157,262	180,099	201,531	90,254	93,379
Grapefruit	240,408	189,744	221,443	208,329	200,273	111,711	110,325
Beer	341,784	280,088	211,861	177,241	199,782	68,213	61,316
Potato Chips	145,468	226,987	257,355	243,824	182,895	88,833	70,558
Walnuts	195,209	153,863	154,449	149,315	175,541	117,393	126,361
Fresh Cherries	140,650	113,556	154,793	169,516	159,885	1,784	1,295
Prunes	138,398	133,732	133,885	131,697	151,664	67,106	63,706
Fresh Tomatoes	123,789	122,345	127,153	148,312	150,990	65,941	59,828
Raisins	204,388	199,733	198,817	145,861	150,869	64,812	61,202
Proc. Sweet Corn	167,490	139,068	148,050	146,591	120,893	53,901	55,933
Total Other	4,838,913	4,765,679	4,864,543	5,121,136	5,296,828	2,114,522	2,131,769
GRAND TOTAL	10,623,941	10,319,150	10,299,184	10,537,852	11,059,857	4,604,422	4,576,884

Top United States Horticultural Product Exports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Feb. FY 2001	Oct. - Feb. FY 2002
Fresh Apples	690,595	539,685	664,969	571,860	742,377	378,034	313,171
Oranges	569,739	609,433	247,419	490,867	541,338	207,821	174,936
Frz. Potato Fries	396,738	438,425	468,826	469,287	505,641	211,270	197,142
Orange Juice All	565,332	553,175	554,951	550,888	464,112	183,646	149,035
Grapefruit	484,417	387,216	428,784	390,958	390,498	220,287	217,845
Fresh Onions	265,859	292,328	257,089	333,775	357,427	209,598	164,188
Fresh Lettuce	294,571	303,816	312,563	328,600	350,247	152,350	157,434
Wine & Wine Prdts	208,786	266,294	274,696	281,475	311,924	122,228	107,407
Fresh Grapes	236,400	214,569	221,158	272,901	303,583	146,330	143,983
Beer	536,362	425,523	330,158	278,522	300,673	100,239	90,389
Proc. Tomatoes	293,112	300,327	264,369	277,277	297,129	125,361	126,924
Almonds	187,953	202,968	200,847	220,099	258,543	122,399	154,625
Fresh Melons	219,695	211,310	247,448	250,860	234,887	39,185	35,986
Fresh Tomatoes	153,657	133,687	148,271	181,892	173,470	66,034	70,351
Pears	126,603	156,807	145,816	162,629	158,199	91,014	103,622
Fresh Broccoli	130,999	126,791	154,514	182,848	157,465	53,005	51,733
Proc. Sweet Corn	203,613	171,294	186,153	187,818	150,891	69,004	63,518
Peaches	103,442	80,023	97,974	113,098	129,221	10,478	14,392
Lemons	120,330	113,392	113,931	106,249	110,507	52,438	47,378
Raisins	115,215	120,741	104,225	83,832	109,877	45,496	45,266

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

Source: U.S. Department of Commerce, Bureau of the Census.

Top United States Horticultural Product Imports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Feb. FY 2001	Oct. - Feb. FY 2002
				--- 1,000 Dollars ---			
Beer	1,443,326	1,677,002	1,865,038	2,126,018	2,296,135	809,984	890,747
Wine & Wine Prdts	1,629,254	1,829,709	2,150,057	2,271,185	2,283,829	962,063	1,014,614
Bananas & Plantns	1,194,458	1,188,442	1,180,227	1,098,409	1,125,986	441,846	463,641
Nursery Products	565,267	632,672	673,194	745,977	789,101	333,832	331,558
Fresh Tomatoes	611,612	735,180	713,121	608,428	755,045	345,058	204,867
Fresh Grapes	386,183	440,659	545,409	518,260	581,556	261,628	301,352
Cut Flowers	572,926	630,067	578,766	623,213	577,418	268,165	241,738
Fresh Peppers	251,908	343,606	324,880	451,848	507,988	199,249	179,824
Cashews	292,315	339,490	390,111	487,687	366,689	160,880	151,101
Frz. Potato Fries	156,831	216,576	252,437	321,914	338,228	136,029	158,869
Essential Oils	322,447	350,086	315,861	309,570	300,590	125,667	136,071
Fresh Melons	226,502	250,921	277,880	259,797	285,704	129,326	112,938
All Apple Juices	354,632	228,735	210,263	278,975	230,406	90,623	102,796
Olives	184,217	181,730	200,293	184,928	204,810	82,494	81,476
Fresh Cucumbers	100,823	154,634	138,241	168,771	200,549	84,184	86,775
All Orange Juices	240,072	211,353	285,947	243,298	185,093	74,338	52,472
Fresh Onions	127,447	151,990	135,574	131,705	168,116	80,517	75,553
Fresh Mangos	123,009	125,047	138,823	142,010	152,116	33,228	42,128
Fresh Pineapple	74,441	83,676	121,679	117,539	151,753	60,500	62,005
Total Other	4,222,577	4,604,941	5,368,446	5,315,151	5,524,521	2,406,219	2,685,808
GRAND TOTAL	13,080,247	14,376,516	15,866,247	16,404,683	17,025,633	7,085,830	7,376,333

1/ Nursery Products excludes cut flowers.

United States Top Horticultural Product Imports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/ 2/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Feb. FY 2001	Oct. - Feb. FY 2002
Beer	1,612,379	1,869,577	2,072,394	2,290,532	2,490,735	869,962	959,792
Wine & Wine Prdts	432,192	428,664	420,152	481,164	510,730	206,128	229,636
Bananas & Plantns	3,911,294	4,135,832	4,369,283	4,350,838	4,046,727	1,664,233	1,647,743
Nursery Products	2,206,085	2,460,306	2,765,772	2,860,569	2,926,298	1,259,941	1,270,072
Fresh Tomatoes	743,205	856,852	722,591	708,690	868,118	381,390	208,890
Fresh Grapes	857	1,039	978	1,185	1,061	519	554
Cut Flowers	2,770,092	2,770,186	2,707,948	2,804,568	2,642,134	1,192,217	1,145,670
Fresh Peppers	284,221	319,671	345,444	352,169	346,518	150,998	181,290
Frz. Potato Fries	269,794	353,931	397,455	470,605	519,751	205,342	253,632
Fresh Melons	779,005	860,437	873,032	898,995	878,214	402,689	380,776
All Apple Juices	1,084,986	1,016,823	1,140,355	1,171,502	1,230,760	432,597	582,475
Fresh Cucumbers	302,306	327,745	336,045	346,863	373,596	202,645	202,391
All Orange Juices	1,116,798	1,063,239	1,326,231	1,284,749	976,227	424,917	284,678
Fresh Onions	261,088	259,188	246,532	224,080	269,156	114,162	128,387
Fresh Mangos	191,115	188,767	212,992	231,078	229,492	43,411	58,818
Fresh Pineapple	171,253	255,533	272,601	304,207	333,476	140,239	126,886
Fresh Squash	141,192	157,537	151,916	156,520	168,099	101,145	103,882
Frozen Broccoli	169,458	153,962	186,187	164,090	168,988	86,135	87,241
Fresh Apples	168,564	156,700	158,550	170,490	156,593	22,742	24,916

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.
2/ Nursery Products excludes cut flowers.
Source: U.S. Department of Commerce, Bureau of the Census.

Selected Horticultural Crop Prices Received By U.S. Growers

Commodity	Domestic units	2001 March	2002 February	2002 March 1/	% Change Last Month	% Change Last Year
			Dollars/unit			
Grapefruit 2/	Box	1.66	1.7	1.23	-27.6%	-25.9%
Lemons 2/	Box	1.28	6.64	5.74	-13.6%	348.4%
Limes 2/	Box	0	0	0	n/a	n/a
Oranges 2/	Box	4.54	4.42	4.88	10.4%	7.5%
Tangelos 2/	Box	0	0.74	0	n/a	n/a
Tangerines 2/	Box	10.72	9.88	8.19	-17.1%	-23.6%
Temples 2/	Box	1.01	2.05	1.25	-39.0%	23.8%
Apples, fresh 3/	Lb.	0.146	0.214	0.21	-1.9%	43.8%
Grapes	Lb.	0	0	0	n/a	n/a
Peaches	Ton	0	0	0	n/a	n/a
Pears, fresh 3/	Ton	296	276	267	-3.3%	-9.8%
Strawberries, fresh	Lb.	0.811	1.04	1.09	4.8%	34.4%
Asparagus 4/	Cwt.	147	162	119	-26.5%	-19.0%
Broccoli 4/	Cwt.	24.2	44.4	29.2	-34.2%	20.7%
Cantaloupes	Cwt.	0	0	0	n/a	n/a
Carrots 4/	Cwt.	17.3	19.7	21.1	7.1%	22.0%
Cauliflower 4/	Cwt.	23.2	30.8	49.2	59.7%	112.1%
Celery 4/	Cwt.	15.8	19.5	22.3	14.4%	41.1%
Sweet Corn 4/	Cwt.	25.7	23.5	29	23.4%	12.8%
Cucumbers 4/	Cwt.	44.1	0	22.4	n/a	-49.2%
Lettuce 4/	Cwt.	15	44.1	86.5	96.1%	476.7%
Onions 4/	Cwt.	15.6	8.27	6.8	-17.8%	-56.4%
Snap Beans 4/	Cwt.	44	53.8	42.1	-21.7%	-4.3%
Tomatoes 4/	Cwt.	56.5	26.6	36.9	38.7%	-34.7%

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2/ Equivalent on-tree returns.
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Note: Zeroes indicate insufficient information or insufficient sales to establish a price.
Source: National Agricultural Statistics Service (NASS), USDA.

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